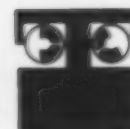


# TRAVEL PRINTOUT



Supported by a grant from Travel Industry Association of America

U.S.  
Travel  
Data  
Center



Research News for the U.S. Travel Industry

December 1984

Volume 13, Number 12

## SECOND QUARTER 1984 TRAVEL INCREASES SLIGHTLY OVER PREVIOUS YEAR

Despite a favorable economic climate, travel for the second quarter of 1984 barely exceeded year-earlier levels as Americans apparently continued to concentrate on restocking durable goods, according to the U.S. Travel Data Center's 1984 National Travel Survey Second Quarter Report, released today.

Americans took 270 million person-trips during April, May and June 1984, according to the report, an increase of nearly 2 percent over the same period in 1983. (A person-trip is measured each time anyone goes 100 miles or more away from home.) A decline in travel for convention and business purposes nearly offset gains in vacation travel and travel for "other pleasure" such as sightseeing, recreation or entertainment.

Vacation trips were shorter both in distance, averaging 840 miles (down from 1,020 miles last year), and in duration, averaging 5.6 nights (down from 6.1 nights).

1984, increased 1 percent from second quarter of last year. Travel by air increased almost 9 percent over year-earlier levels.

The number of travelers lodging in hotels or motels rose 7 percent, while those staying with friends or relatives increased 6 percent.

Travelers with annual household income of \$30,000 or more have accounted for over half the person-trips recorded in recent months, and travel by this group rose 9 percent in second quarter 1984. Travel by families in the \$20,000 to \$29,000 income category increased even more, while households earning less than \$20,000 annually reduced their level of travel significantly below second quarter 1983.

The 1984 National Travel Survey Second Quarter Report is being sent to members and is available to others for \$65.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. #

PERCENT DISTRIBUTION OF TOTAL PERSON-TRIPS  
BY DESTINATION REGION, SECOND QUARTER 1984



OUTSIDE US: 8%

TOTAL: 270.6 MILLION PERSON-TRIPS

Travel by personal motor vehicle, which accounted for the majority of travel during the second quarter of

## U.S. TRAVEL DATA CENTER ELECTS AMTRAK VICE PRESIDENT AS CHAIRMAN

Robert E. Gall, vice president of transportation marketing for Amtrak, will serve as the U.S. Travel Data Center's Board of Trustees chairman for 1985. Gall, elected at the board's December meeting, has been a trustee since 1980 and served as vice chairman in 1984. He replaces Bob LeBlanc, director of the Louisiana Division of Tourism, who will return for another two-year term as trustee.

(Continued on Page 3)

## TRAVEL PRICES REMAIN UNCHANGED IN OCTOBER

The cost of travel in the U.S. remained unchanged in October, the second consecutive month in which no change has occurred, according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the Consumer Price Index (CPI) rose 0.3 percent on a seasonally unadjusted basis in October 1984.

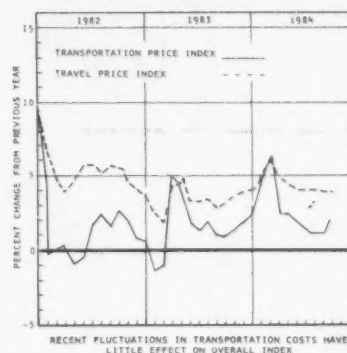
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, was unchanged at 369.0 in October (1967=100).

Lodging rates dropped 1.3 percent, the only TPI component to decrease in October. Intercity train fares remained unchanged.

Airfares showed the largest gain, 0.8 percent, followed by bus fares, up 0.7 percent. Gasoline prices advanced

0.7 percent for their second straight monthly increase.

The TPI has risen 3.9 percent since October of last year, compared to 4.2 percent growth in the CPI. Commercial lodging grew 6.8 percent, leading all components during this period, followed by a 6.6 percent increase in intercity bus fares. However, gasoline prices declined 3.2 percent over the last year.##



Monthly and Annual Rates of Change in the Travel Price Index and Components, October 1984

| TPI Component          | Monthly Percent Change              | Annual Percent Change             |
|------------------------|-------------------------------------|-----------------------------------|
|                        | September, 1984<br>to October, 1984 | October, 1983<br>to October, 1984 |
| Transportation         | 0.7                                 | 2.0                               |
| Airline Fares          | 0.8                                 | 6.3                               |
| Intercity Bus Fares    | 0.7                                 | 6.6                               |
| Intercity Train Fares  | 0.0                                 | 4.5                               |
| Taxicab Fares          | 0.1                                 | 2.6                               |
| Gasoline               | 0.7                                 | - 3.2                             |
| Lodging                | - 1.4                               | 6.8                               |
| Food Away From Home    | 0.2                                 | 3.9                               |
| Entertainment Services | 0.6                                 | 5.5                               |
| Incidentals            | 0.5                                 | 2.5                               |
| TRAVEL PRICE INDEX     | 0.0                                 | 3.9                               |
| CONSUMER PRICE INDEX   | 0.3                                 | 4.2                               |

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$45 per year, U.S., Canada and Mexico; other foreign countries, \$55 per year, payable in U.S. funds only.

## AUGUST TRAVEL DECLINES

Although August marks the peak of the summer travel season, total travel for the month fell short of the level set in August 1983 by 2 percent, according to the U.S. Travel Data Center's National Travel Survey results, released today.

The monthly telephone survey reported person-trips for the month totaled 132 million, 2 percent below the 135 million recorded last August. (A person-trip is measured each time anyone goes 100 miles or more away from home.) Trips of longer duration, however, produced a 2 percent increase in nights spent away from home in August.

Vacation travel, posting a 3 percent decline in August 1984, failed to exceed year-earlier levels for the second consecutive month but registered an increase over levels recorded in July 1984.

Pleasure travel appeared to follow the same trend this August as vacation travel, rising over July's level, but falling nearly 5 percent from August 1983. Weekend travel declined 8 percent, its smallest decrease since March. These declines were somewhat offset by an increase in travel for business or convention purposes.

Average trip duration rose from 5.4 nights one year earlier to 6 nights in August, and round-trip distance also increased, from 880 round-trip miles in August 1983 to 960 miles.

Travel to The South rose substantially, as did travel to the Mountain West/Far West region. The Northeast, Great Lakes Country and Frontier West regions, however, all recorded declines as destinations.

Vacation travel for June, July and August 1984 totaled 268 million person-trips, an increase of almost 2 percent over summer vacation travel last year. In May the U.S. Travel Data Center had projected a 3 percent rise in vacation person-trips for this summer.

The number of people planning to take a trip during the six months fol-

lowing August 1984 increased 18 percent over last year's figure, although anticipated trip duration remained virtually the same. While most people intended to travel by personal motor vehicle, air travel intentions rose sharply, and plans to stay in hotel/motels on overnight vacation trips rose 2 percent. The South and Frontier West expect to experience the greatest growth in vacation visitors over the next six months. ##

## (CONTINUED FROM PAGE 1)

Randall Wagner, director of the Wyoming Travel Commission and a member of the board of trustees since 1982, will serve as vice chairman. The board re-elected Charles R. Goeldner, director of the Business Research Division of the University of Colorado, to serve as secretary, and William Toohey, president of the Travel Industry Association, was re-elected treasurer.

Newly elected trustees are Max L. Madsen, director of travel marketing for Better Homes & Gardens; Laurie Jo Miller, vice president of tourism development, New York Convention and Visitors Bureau; and Troy Woodbury, national market manager for AT&T Communications.

Jesse Liebman, vice president of scheduling and pricing for Trans World Airlines, and Robert L. Richards, executive vice president of the American Hotel and Motel Association, were re-elected to the board of trustees. ##

The U.S. Travel Data Center will release the 1985 Outlook for Travel and Tourism, the complete proceedings of its annual Travel Outlook Forum, on January 20. Data Center members will receive the 1985 Outlook, containing speakers' updated remarks, charts and tables. It is available to others for \$75 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Washington, DC 20036. ##

## States comprising the Census regions:

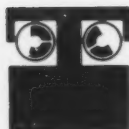
NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

## CURRENT TRAVEL INDICATORS

|                                               |                  | % Change from<br>September 1984 | % Change from<br>August, 1984 | % Change from<br>September, 1983 | Year-to-date<br>% change<br>1984/83 |
|-----------------------------------------------|------------------|---------------------------------|-------------------------------|----------------------------------|-------------------------------------|
| <u>Establishment receipts or retail sales</u> |                  |                                 |                               |                                  |                                     |
| Hotels, motels and other lodging places(1)    | \$ 2,978 million | - 8.6                           |                               | 17.6                             | 14.8                                |
| Eating and drinking places(2)                 | \$11,627 million | 4.2                             |                               | 16.7                             | 8.8                                 |
| Gasoline service stations(2)                  | \$ 9,153 million | 0.5                             |                               | 3.6                              | 2.7                                 |
| <u>Commercial lodging demand</u>              |                  |                                 |                               |                                  |                                     |
| Hotel/motel occupancy rate(3)                 | 66.7 percent     | 2.9                             |                               | 1.4                              | 2.1                                 |
| Real demand for commercial lodging(4)         | \$1,024 million  | - 8.1                           |                               | 2.4                              | 5.8                                 |
| <u>Airline passenger traffic(5)</u>           |                  |                                 |                               |                                  |                                     |
| Domestic revenue passenger-miles              | 15.2 billion     | -19.2                           |                               | 7.1                              | 0.4                                 |
| International revenue passenger-miles         | 5.6 billion      | -12.5                           |                               | - 3.6                            | 10.5                                |
| <u>Bus passenger traffic(6)</u>               |                  |                                 |                               |                                  |                                     |
| Intercity bus passenger-miles                 | 2.3 billion      | -26.5                           |                               | - 1.7                            | - 2.4                               |
| <u>Highway traffic volume(7)</u>              |                  |                                 |                               |                                  |                                     |
| Rural arterial vehicle-miles                  | 38.1 billion     | -16.0                           |                               | - 1.8                            | 4.8                                 |
| <u>Rail passenger traffic(8)</u>              |                  |                                 |                               |                                  |                                     |
| Amtrak passenger-miles                        | 331.0 million    | -31.7                           |                               | - 2.7                            | 6.2                                 |
| <u>Travel Price Index(9)</u>                  |                  |                                 |                               |                                  |                                     |
|                                               | 368.9            | - 0.2                           |                               | 3.9                              | 4.6                                 |
| <u>U.S. resident travel(10)</u>               |                  |                                 |                               |                                  |                                     |
| Total person-trips                            | N/A              | N/A                             |                               | N/A                              | N/A                                 |
| Vacation person-trips                         | N/A              | N/A                             |                               | N/A                              | N/A                                 |
| <u>Public use of national parks(11)</u>       |                  |                                 |                               |                                  |                                     |
| Visits                                        | 24,860,511       | -31.2                           |                               | - 1.3                            | - 3.9                               |
| Overnight stays                               | 1,790,679        | -45.4                           |                               | - 1.8                            | 12.0                                |
| <u>Foreign arrivals in U.S.(12)</u>           |                  |                                 |                               |                                  |                                     |
| From overseas                                 | N/A              | N/A                             |                               | N/A                              | N/A                                 |
| From Canada                                   | 965,325          | -33.6                           |                               | - 7.8                            | - 8.3                               |
| <u>U.S. citizen departures(12)</u>            |                  |                                 |                               |                                  |                                     |
| To overseas                                   | N/A              | N/A                             |                               | N/A                              | N/A                                 |
| To Canada                                     | 1,202,252        | -50.0                           |                               | - 2.6                            | 6.4                                 |
| <u>Domestic demand for motor gasoline(13)</u> |                  |                                 |                               |                                  |                                     |
| Barrels per day                               | 6,545 thousand   | 1.7                             |                               | - 1.6                            | - 0.3                               |

(1)Source: Lavenhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Lavenhol and Horwath, seasonally adjusted. (4)Source: Lavenhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

**U.S.  
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Data  
Center**



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December 1984

## TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

U.S. POSTAGE  
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FIRST CLASS  
PERMIT NO. 45523  
WASHINGTON, D.C.

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Supported by a grant from Travel Industry Association of America

U.S.  
Travel  
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Research News for the U.S. Travel Industry

January 1985

Volume 14, Number 1

## STATE TRAVEL DEVELOPMENT BUDGETS RISE 23 PERCENT IN 1984-85

State travel offices in 50 states plan to spend \$189 million for travel and tourism development in 1984-85, according to the 1984-85 Survey of State Travel Offices, compiled by the U.S. Travel Data Center.

The survey reports tourism development budgets for the 50 states increased 23 percent over 1983-84. Much of the growth is due to a jump in California's travel development budget, from \$469,969 in the previous year to \$5,692,375 in fiscal 1984-85. The increase moved California from last place in travel development spending to ninth place.

Thirty-four states posted budget increases for the current year. The average state travel development budget is \$3,787,854, an all-time high.

Illinois, which increased its spending 324 percent, has the largest budget, \$14 million, followed by New York with more than \$12 million.

### TOP TEN STATES BY TRAVEL PROMOTION BUDGETS, 1984-85

|                  |              |
|------------------|--------------|
| 1. Illinois      | \$14,400,000 |
| 2. New York      | 12,046,400   |
| 3. Massachusetts | 10,536,170   |
| 4. Alaska        | 9,246,800    |
| 5. Florida       | 9,200,000    |
| 6. Michigan      | 9,074,900    |
| 7. Pennsylvania  | 7,860,000    |
| 8. Tennessee     | 7,234,000    |
| 9. California    | 5,692,375    |
| 10. New Jersey   | 5,551,000    |

Eleven states plan to spend less on travel development, however. Louisiana posted the greatest cutback, decreasing spending by almost 22 percent from last year's figure.

The survey reports a 37 percent increase from the prior year's advertising budget allocations. The average state is devoting more than \$1.5 million to advertising, 40 percent of the average total. Illinois is spending the most on advertising of any state, \$10 million, or 70 percent of its total travel development budget.

"More and more states are recognizing that tourism plays an essential role in economic development," commented Dr. Douglas C. Frechtling, director of the Data Center. "This year's extraordinary rise in state travel development budgets bodes well for future regional growth and stability."

The 1984-85 Survey of State Travel Offices is the twelfth annual report on the budgets, advertising and programs of the state and U.S. territory tourism development agencies. The 100-page report will be sent to Data Center members and is available for \$55.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

## 1986 TRAVEL OUTLOOK FORUM MOVES TO NEW ORLEANS

In conjunction with the Travel Industry Association's National Travel Conference, the U.S. Travel Data Center will hold its 1986 Travel Outlook Forum on September 20, 1985 at the New Orleans Hilton Riverside & Towers Hotel. Don't miss this unique opportunity to hear experts in many sectors of the travel industry predict the trends for the coming year. For more information, contact the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. Mark your calendar now! ##

## TRAVEL PRICES DECLINE IN NOVEMBER

Travel costs decreased 0.3 percent in November, the second decline in travel prices during 1984, according to the U.S. Travel Data Center's Travel Price Index (TPI).

The TPI fared well compared to the Consumer Price Index (CPI) as the latter was unchanged on a seasonally unadjusted basis in November.

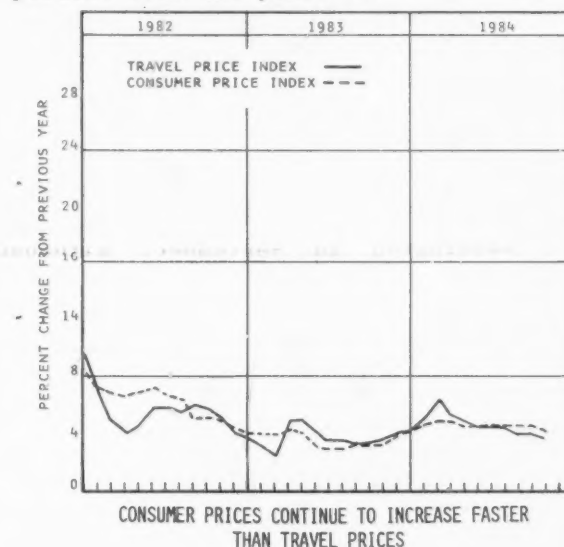
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, fell to 367.8 in November, (1967=100).

The prices of both lodging and entertainment dropped 1.4 percent and gasoline prices declined for the first time in three months.

On the other hand, railroad, airplane and intercity bus fares increased 0.4 percent from the previous month. Prices of food away from home rose 0.2 percent and taxicab fares increased 0.1 percent. The only TPI component to remain unchanged from October was incidentals.

Since November of last year, travel prices have increased only 3.7 percent compared to a 4.0 percent growth rate in the CPI.

Intercity bus fares rose the most on a yearly basis, increasing 7.5 percent. Lodging prices, airplane and railroad fares all grew by more than 5 percent over the year. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components, November 1984

| TPI Component          | Monthly Percent Change             | Annual Percent Change               |
|------------------------|------------------------------------|-------------------------------------|
|                        | October, 1984<br>to November, 1984 | November, 1983<br>to November, 1984 |
| Transportation         | 0.1                                | 2.0                                 |
| Airline Fares          | 0.4                                | 5.5                                 |
| Intercity Bus Fares    | 0.4                                | 7.5                                 |
| Intercity Train Fares  | 0.4                                | 5.1                                 |
| Taxicab Fares          | 0.1                                | 2.2                                 |
| Gasoline               | - 0.3                              | - 2.4                               |
| Lodging                | - 1.4                              | 6.4                                 |
| Food Away From Home    | 0.2                                | 3.8                                 |
| Entertainment Services | - 1.4                              | 3.7                                 |
| Incidentals            | 0.0                                | 2.5                                 |
| TRAVEL PRICE INDEX     | - 0.3                              | 3.7                                 |
| CONSUMER PRICE INDEX   | 0.0                                | 4.0                                 |

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

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## MEMBERS EVALUATE U.S. TRAVEL DATA CENTER SERVICES

In a recent survey, members declared the U.S. Travel Data Center's reports useful not only to members but to the travel industry as a whole.

The 89 full, limited, state and academic members who responded to the mailed questionnaire, over 60 percent of the Data Center's membership, ranked the Outlook for Travel and Tourism, Travel Printout, Economic Review of Travel in America and Impact of Travel on State Economies as the most valuable of the Data Center's publications.

Of those member respondents who have attended the annual Travel Outlook Forum, 94.5 percent believed it was valuable. Most would prefer a forum held in Washington in September, although although over 50 percent said they would be likely to attend regional meetings of the forum.

Approximately 73 percent of the respondents said they would be interested in attending seminars on how to use Data Center research.

A large majority of member respondents have direct access to a computer

system that will communicate with other computers over telephone lines; however, only one-half expressed an interest in computer access to Data Center research.

Generally, members perceive Data Center dues and costs to about right. ##

## WORKSHOP FOCUSES ON RESEARCH AS TRAVEL MARKETING TOOL

The U.S. Travel Data Center will join forces with the United States Travel and Tourism Administration (USTTA) and The George Washington University to present a travel marketing research workshop on February 7 and 8.

The workshop, which immediately follows USTTA's city-state days, will provide participants with information and techniques for the effective use of research and data in formulating marketing strategy. Participants will learn to adapt research to individual needs. Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, Suzanne Cook, its assistant director, and Dr. John Hunt, chairman of The George Washington University's travel and tourism program, will lead the workshop. Session topics will include: "Research Data as a Tool in Marketing Planning", "Identifying Data Sources for Use in Marketing Planning", "Problems of Accessing and Using Data" and "Deciding When It Is Necessary to Do Primary Research."

Participants will apply their new skills in collecting and using data to real-life situations simulated by case studies. On the second day of the workshop participants will present case study assignments for evaluation.

For more information or to register for the Travel Marketing Research Workshop, contact Nancy Chesworth Weir, Travel and Tourism Program, The George Washington University, 817 23rd Street NW, Washington, DC 20052, 202/676-7071. ##

## DATA CENTER ENCOURAGES STATE AND FULL MEMBERS TO REVIEW BENEFITS

Some of the U.S. Travel Data Center's full and state members are not taking advantage of their membership benefits, according to Director Douglas C. Frechtling. "Full members can designate as many as four recipients of our reports," he said, "and may purchase additional copies at half price. State members can designate two recipients, and are entitled to the same discount."

Full and state members should review their records and contact Laura Goodin, assistant manager for information systems, at 202/293-1040 with any changes in their list of Data Center representatives. (These may be anyone in the member organization or an advertising account executive.) ##

### States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

## CURRENT TRAVEL INDICATORS

|                                                                   | October 1984 | % Change from<br>September 1984 | % Change from<br>October 1983 | Year-to-date<br>% change<br>1984/83 |
|-------------------------------------------------------------------|--------------|---------------------------------|-------------------------------|-------------------------------------|
| <u>Establishment receipts or retail sales</u>                     |              |                                 |                               |                                     |
| Hotels, motels and other lodging places(1) . . . \$ 2,076 million |              | - 3.4                           | 6.2                           | 13.9                                |
| Eating and drinking places(2) . . . \$10,409 million              |              | - 2.1                           | 2.9                           | 7.1                                 |
| Gasoline service stations(2) . . . \$ 6,786 million               |              | 1.7                             | - 0.6                         | 1.6                                 |
| <u>Commercial lodging demand</u>                                  |              |                                 |                               |                                     |
| Hotel/motel occupancy rate(3) . . . 66.4 percent                  |              | - 0.4                           | - 0.3                         | 1.6                                 |
| Real demand for commercial lodging(4) . . . \$ 1,000 million      |              | - 2.3                           | - 0.3                         | 5.1                                 |
| <u>Airline passenger traffic(5)</u>                               |              |                                 |                               |                                     |
| Domestic revenue passenger-miles . . . 16.4 billion               |              | 7.8                             | 1.4                           | 0.5                                 |
| International revenue passenger-miles . . . 4.9 billion           |              | -12.4                           | 6.2                           | 10.1                                |
| <u>Bus passenger traffic(6)</u>                                   |              |                                 |                               |                                     |
| Intercity bus passenger-miles . . . 2.4 billion                   |              | 3.0                             | 1.3                           | - 2.0                               |
| <u>Highway traffic volume(7)</u>                                  |              |                                 |                               |                                     |
| Rural arterial vehicle-miles . . . 36.7 billion                   |              | 1.3                             | 4.0                           | 5.3                                 |
| <u>Rail passenger traffic(8)</u>                                  |              |                                 |                               |                                     |
| Amtrak passenger-miles . . . 322.6 million                        |              | - 2.5                           | 6.0                           | 6.2                                 |
| <u>Travel Price Index(9)</u>                                      |              |                                 |                               |                                     |
| 369.0                                                             |              | 0.0                             | 3.9                           | 4.5                                 |
| <u>U.S. resident travel(10)</u>                                   |              |                                 |                               |                                     |
| Total person-trips . . . N/A                                      |              | N/A                             | N/A                           | N/A                                 |
| Vacation person-trips . . . N/A                                   |              | N/A                             | N/A                           | N/A                                 |
| <u>Public use of national parks(11)</u>                           |              |                                 |                               |                                     |
| Visits . . . 20,560,013                                           |              | -17.3                           | 3.3                           | - 3.2                               |
| Overnight stays . . . 882,332                                     |              | -50.7                           | -14.9                         | 10.1                                |
| <u>Foreign arrivals in U.S.(12)</u>                               |              |                                 |                               |                                     |
| From overseas . . . N/A                                           |              | N/A                             | N/A                           | N/A                                 |
| From Canada . . . 734,455                                         |              | -16.9                           | -13.1                         | - 8.7                               |
| <u>U.S. citizen departures(12)</u>                                |              |                                 |                               |                                     |
| To overseas . . . N/A                                             |              | N/A                             | N/A                           | N/A                                 |
| To Canada . . . 739,965                                           |              | -36.5                           | 1.9                           | 6.1                                 |
| <u>Domestic demand for motor gasoline(13)</u>                     |              |                                 |                               |                                     |
| Barrels per day . . . 6,709 thousand                              |              | - 0.3                           | 1.6                           | 0.2                                 |

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Hattleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

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January 1985

## TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

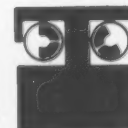
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Supported by a grant from Travel Industry Association of America

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Research News for the U.S. Travel Industry

February 1985

Volume 14, Number 2

## 1985 ECONOMIC OUTLOOK WILL ENCOURAGE TRAVEL

Continuing economic expansion in 1985, which will boost personal income, and relatively low rates of travel price inflation could encourage an increase in additional travel away from home, according to U.S. Travel Data Center Director Douglas C. Frechtling's article in the 1985 U.S. Industrial Outlook.

Dr. Frechtling listed several key factors which will determine the level of travel activity in 1985 and the travel industry's response:

1) Excess capacity on air and intercity bus carriers, offering the consumer greater choice and depressed prices, is likely to dampen industry earnings in these sectors.

2) Air traffic congestion, partially caused by the number of new airlines spawned by deregulation, results in added flights and fare cuts as airlines compete for market share. Such activity can encourage travel through highly publicized discount fares on popular routes.

3) If the dollar remains stable or weakens, additional personal income from the world economic recovery will encourage foreign residents to travel to the United States, while U.S. travel abroad will drop back to more moderate rates of growth. Should the dollar appreciate significantly in 1985, however, U.S. travel to foreign destinations will accelerate again, while foreign visitor flows to the United States will be constrained further.

4) The rate of economic expansion may slow in 1985, but consumer purchases of major durable goods should slow as well from the blistering pace of 1983-84, freeing up additional discretionary funds to finance leisure travel. As a consequence, travel spending in 1985 should rise somewhat faster than in

1984, boosting employment in the travel services industry by 2.5 percent.

5) Long-term economic, demographic and technological developments will reshape business and personal travel patterns, rather than alter the volume of travel during the next five years. Rising personal income and employment, increased discretionary income in many households, and rapid growth in the retired population and in the 35 to 49 age group (the prime travel years) indicate a strong travel industry projected to 1989.

6) Increased use of telecommunications systems, such as videoconferencing, could reduce the growth of business travel for certain purposes in the future. On the other hand, it is more  
(Continued on page 3)

## AIR TRANSPORT ASSOCIATION RELEASES STUDY OF AIR TRAVELERS

Seven out of every 10 adult Americans have flown on a commercial airline, and 27 percent flew during the last year, according to a Gallup study conducted recently for the Air Transport Association.

The "1984 Air Travel Survey", conducted during the past summer involving interviews with 4,571 adults, reports that out of the estimated total adult noninstitutional population of 189 million, approximately 118 million have flown at least once. Those who flew during the 12 months prior to the survey averaged 2.8 round trips each.

The survey states that 74 percent of men have flown on a commercial airplane, compared to 66 percent of women. More whites than non-whites have ever flown, and more people aged 25 to 49 fly  
(Continued on page 3)